

*Fig. 1*

CALL SCREEN

FILE

CONTACT

PHONE

HELP

CONTACT NAME: 

FIRST LAST SSN

CONTACT

DISCUSSION

+

ACCOUNT ADMIN/MAINT

ACCOUNT MAINT-OTHER

ADDRESS CHANGE/UPDATE

ASSET ALLOCATION & ERISA

BALANCE/VESTING INFO

BENEFICIARY

IP

ROLE

SPOUSE

CALL SCREEN

X

FILECONTACTPHONEHELP

CONTACT NAME: FIRSTLASTSSN

CONTACTDISCUSSION

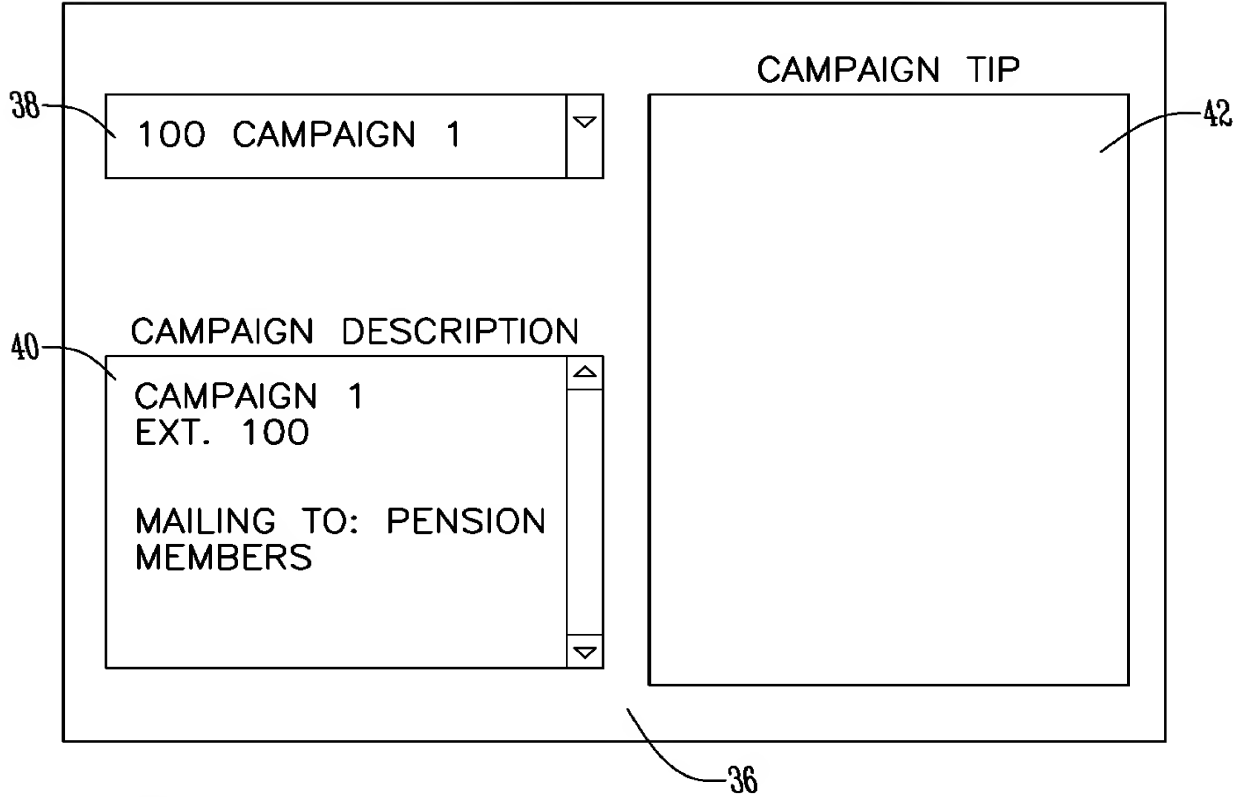
CONTACT HISTORY

SCHEDULED CONTACTS

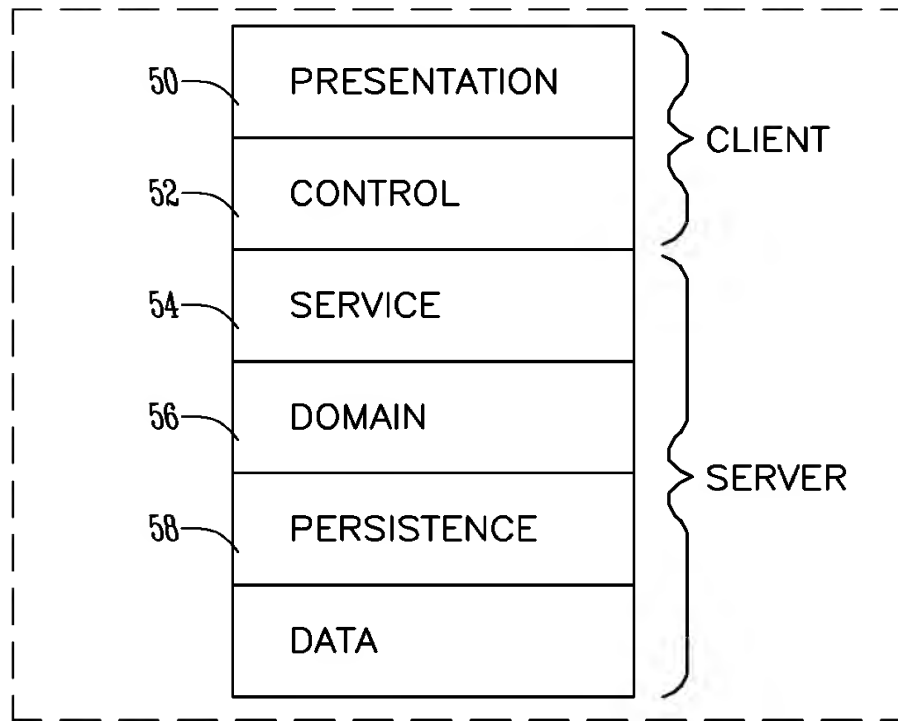
ASSOCIATED CAMPAIGNS

CURRENT CAMPAIGN

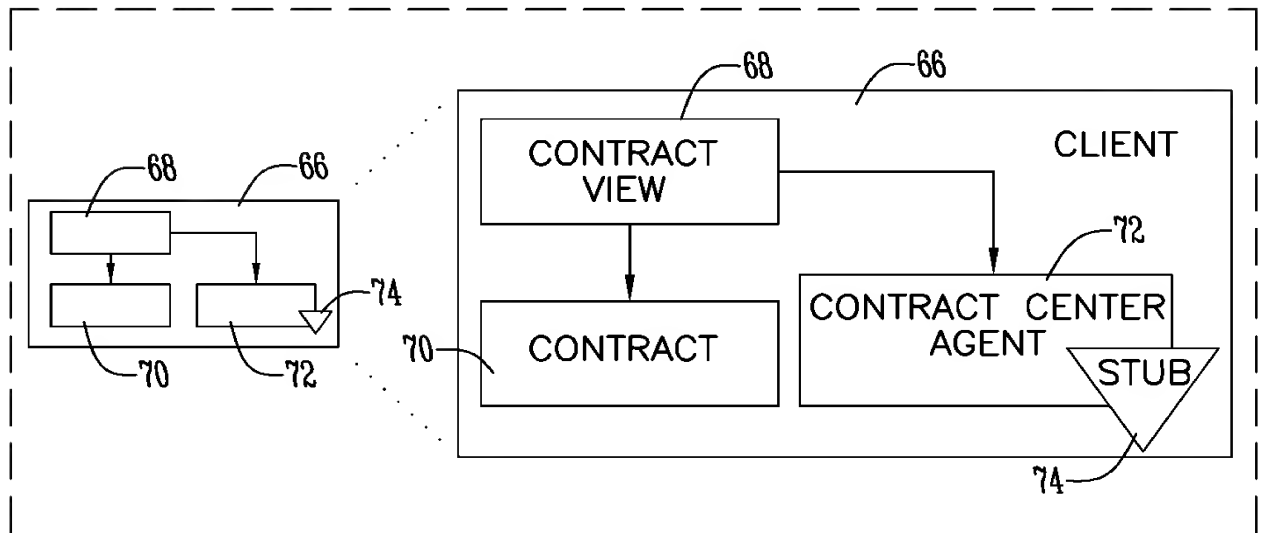
Fig. 3



*Fig. 4*



*Fig. 5*



*Fig. 6*

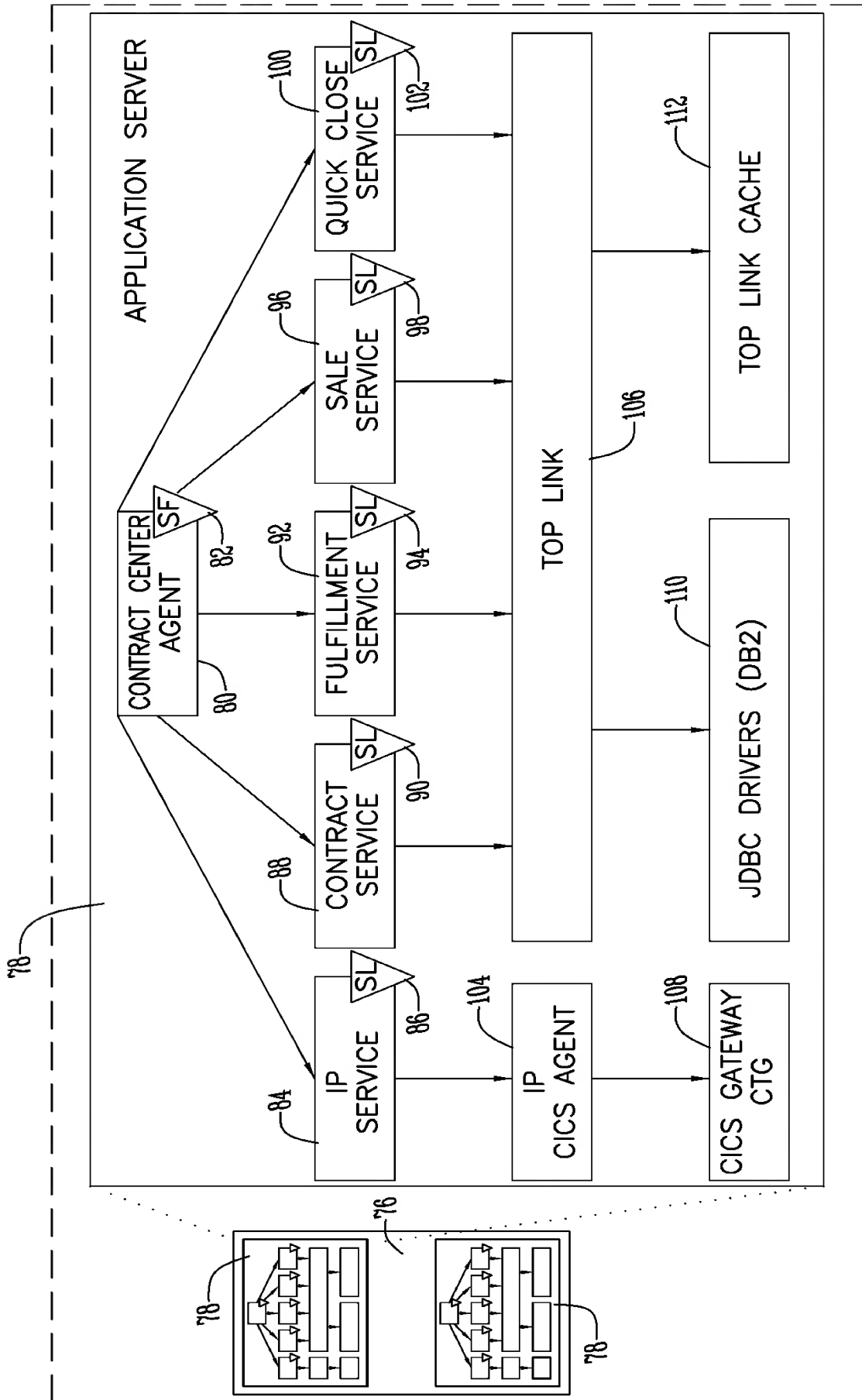


Fig. 7

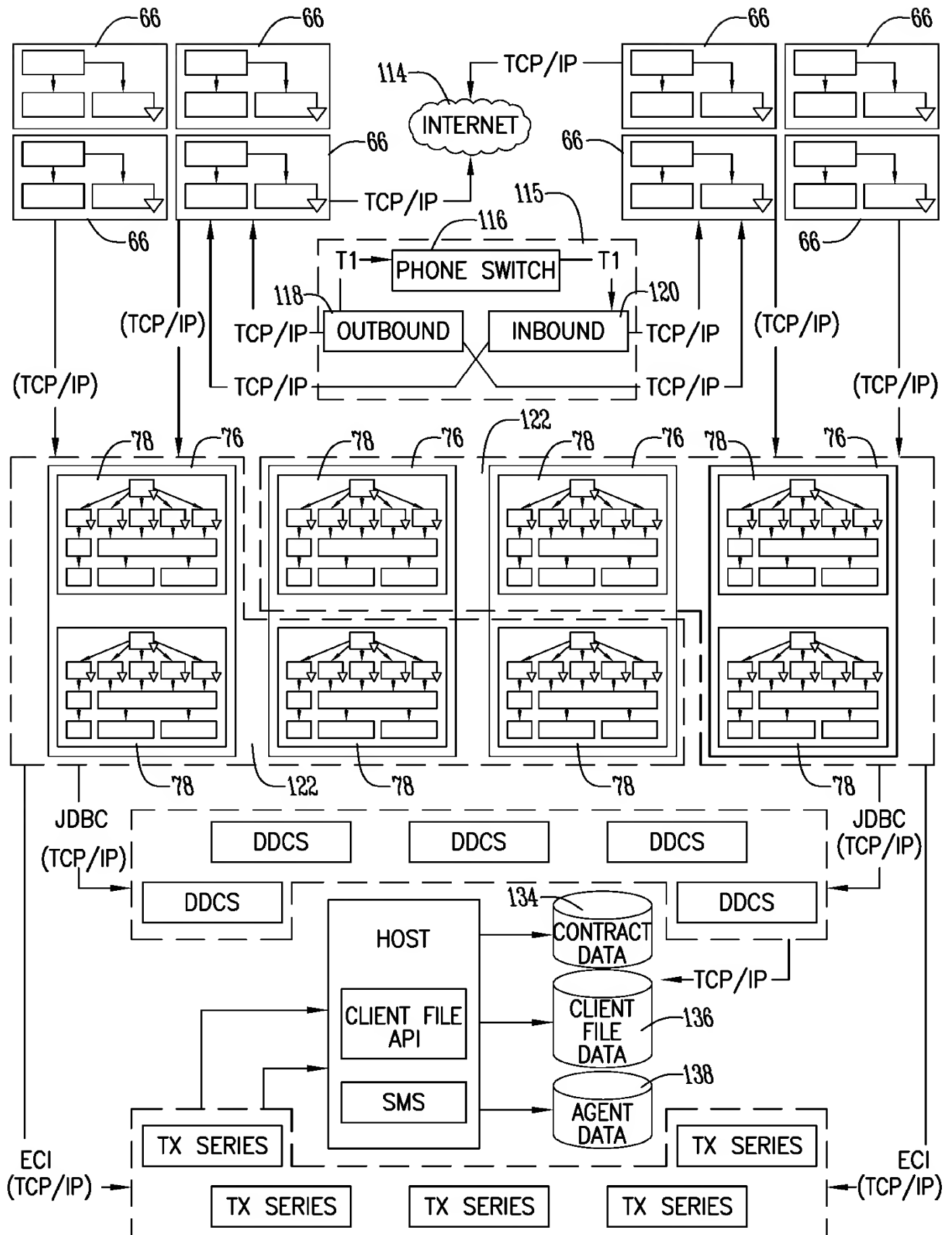


Fig. 8